New Jersey Statewide Voter Registration System Training Plan

Last Revised 7/19/05

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1   TRAINING PROGRAM OVERVIEW

This document reflects work done to define and document the specific SVRS training requirements, training schedule and the Training Plan for the new Voter Registration System. It includes the following components:

Training Requirements (Deliverable SVRS 071)
- Training required for each specified training track
- Number of people to be trained for each training track

Training Plan (Deliverable SVRS 029)
- How the training materials will be developed and what their contents will be
- The methodology used by Covansys to design and deliver training
- The roles and responsibilities of the Covansys team members relating to the training activities

Training Schedule and Location Identification (Deliverable SVRS 072)
- Training Milestones
  - How the training plan synchs up with the overall project schedule components
- How and where the training classes may be scheduled

This is the first draft of the training program; future releases of this document will incorporate additional details of the components of the training program as they are fully developed and deployed.

2   PROJECT BACKGROUND AND OBJECTIVES

2.1 Background

To meet the requirements of the Help America Vote Act of 2002 (HAVA), the State of New Jersey intends to implement and operate a single, centralized, statewide voter registration system.

This new system will impact a number of internal and external parties when implemented January 1, 2006. This includes the Office of the Attorney General, the Division of Elections, and all election administrators within the twenty-one New Jersey counties which includes the County Superintendent of Elections, the County Board of Elections, County and Municipal Clerks. Additionally, impact will be felt by the Motor Vehicles Commission, the Department of Health and Senior Services, the Department of Corrections, the Parole Board and the Administrative Office of the Courts, as data from these organizations will be used to qualify all existing and new voters. Training needs will be driven by the:

- Implementation of new technology
- Activities necessary to maintain data in a centralized database

2.2 New Jersey Voter Registration System Objectives

Objectives for SVRS implementation include:

- Comply with the Help America Vote Act of 2002 (HAVA)
- Meet/exceed the needs of the state, county, and municipal user communities
- Provide an SVRS solution that is technologically reliable, secure, robust, and scalable
- Serve the New Jersey voters by safeguarding the accuracy of voter registration records
- Serve the New Jersey voters by improving and expanding customer service channels
- Standardize voter registration processes and data management practices through the use of a single statewide system
- Provide an overall solution that aligns with State's technical guidelines, thus enabling the State to support the solution.

2.3 Risks

Potential business and organizational risks associated with implementing the Voter Registration training program include:

Election activities may conflict with training schedules – The project is on an extremely tight delivery schedule due to the HAVA compliancy requirements. The implementation schedule and accompanying training activities may coincide with gubernatorial elections that occur in the Fall of 2005. The clerks and registrars will be trying to learn a new system while conducting their day-to-day activities that are the business of preparing for and running an election.

Hardware may not arrive and be installed on time – The concept of Just-in-Time training that is presented in this document cannot be achieved without the physical system components being available to the users after training is complete.

Changes to business procedures and technology within a very short time frame – Election personnel will need to adapt quickly to new Voter Registration processes, new data formats and the use of new technology.

Training facilities may not be available in the desired locations – The schedule depends on having a central location available for training at a specific point in time. There is not much flexibility, if any, in the Rollout schedule, so the dates scheduled for training activities must be met so that the users are prepared Just-in-Time to use the new system.

3   TRAINING PROGRAM

3.1 Program Purpose

The purpose of the SVRS Training Program is to prepare the users and administrative staff to use the SVRS system.

This program will be facilitated by a Training Team consisting of the following people:

- Carole Rennie – Training Manager, Covansys
- Tom Ferguson – Lead Trainer and Subject Matter Expert, Covansys
- Additional Covansys staff members

3.2 Training Audience

The impacts of the SVRS system will vary in degrees to those who are involved with voter registration, and the data collected by that process. Users of the data, both direct and indirect, will be affected by the implementation of the statewide system.

The current situation is one where each county has its own system used for collecting and managing the voter registration data for their county. The SVRS will be one single system, accessed and utilized by all counties. The activities and challenges of the training activities will be the focus of the Training Team.

Those individuals who will receive training include:

- County Voter Registration Officials – the Superintendent of Elections or the Commissioner of Registration, depending on the county, and their staffs
- Board of Election Members and staffs
- County Clerks and staffs
- Municipal Clerks

3.3 Voter Registration Training Strategies

Listed below are the concerns and strategies to address the concerns that will be used by the Training Team for developing, scheduling, and conducting training classes.

Voter Registration Training Strategies	
Concerns	**Strategy**
Lack of computer skills	➢ Review computer skills required to use the Electio***Net*** application ➢ Survey the user population and ask them to self assess their current computer skill level ➢ Verify the findings from the survey ➢ Purchase materials for classroom training to develop basic computer skills (known as Track One training) ➢ Schedule training for up to 125 users who have identified themselves as beginner level computer users ➢ Train SVRS State staff to continue basic computer skills training on an as-needed basis
Tight Implementation Schedule	➢ Work closely with the project team to verify implementation dates for computer hardware ➢ Work closely with the project team to sync training activities with the project rollout schedule ➢ Work with users to locate and reserve available training facilities
Resources	➢ Define and train the required number of Covansys training resources
Communication	➢ Publish a training schedule as early as is possible so that users can schedule time for training. ➢ Work with the project team to publish training schedules in as many locations (e.g. intranet, newsletter) as possible

4   TRAINING REQUIREMENTS (DELIVERABLE SVRS 071)

4.1 Overview

- Training required for each specified training track
- Number of people to be trained for each training track

# of Users	Office/Individual	SVRS Functions	Corresponding Training Modules
15	OAG/DoE	- Reporting - Production of Letter and notices	Reporting and Inquiries module
560 users across 3 county offices	Commissioner of Registration/ Superintendent of County (only 10 counties)	- Add voter records - Modify voter records - Management of geographic information - Reporting - Inquiry - Production of letters and notices - County information management	- Overview of System Functions - Reporting and Inquiries module - All hands-on training modules
	County Board of Elections	- Absentee ballot management - Provisional ballot management - Election results certification and processing - Poll location definition and maintenance - Poll worker management	- Overview of System Functions - All hands on training modules
	County Clerks	- Petition management - Receive and process absentee ballot requests - Provisional ballot tracking	- Overview of System Functions - Training modules that interface with absentee ballots, in person ballots and poll books

# of Users	Office/Individual	SVRS Functions	Corresponding Training Modules
		• Reporting	
566 users	Municipal Clerks	• Petition management for local elections • Voter Inquiry • Recommendation of locations to Board of Elections • Municipal information management	• Overview of System Functions • All hands on training modules
	School Board Secretary		• Overview of System Functions
	Fire District Commission	• Pollbook generation	• Overview of System Functions • Training modules that interface with poll books

4.2 Implementation Groups Organized By County

The training schedule will mirror the Implementation Schedule by scheduling the Training activities to occur just prior to the Implementation activities. The following chart lists the Implementation Dates planned for each County. The dates and assumptions that are listed in this document are based on this breakdown.

Pilot Groups	Group A	Group B	Group C	Group D
10/3/2005 & 10/10/2005	11/23/2005	12/02/2005	12/12/2005	12/16/2005
Gloucester	Atlantic	Camden	Morris	Bergen
Mercer	Cape May	Hunterdon	Somerset	Burlington
Ocean	Cumberland	Monmouth	Warren	Passaic
Essex	Hudson	Sussex		
Middlesex	Salem			
Union				

5   VOTER REGISTRATION TRAINING PLAN (DELIVERABLE SVRS 029)

5.1 Purpose

The purpose of this Training Plan is to prepare and document the procedures that will be followed to deliver a training solution to the State of New Jersey for the Statewide Voter Registration System (referred to as SVRS). This Training Plan will define and sharpen the focus for delivering an effective and successful training program for all levels of New Jersey SVRS users. It will present a step-by-step guide to preparing and delivering the training materials for the Electio*Net* application. It will also identify the various deliverables that will support the training and implementation of the Electio*Net* application.

The SVRS project's primary goals are to have the State of New Jersey HAVA-compliant by January 2006 and to centralize the voter list for the State of New Jersey. These goals will be met by the implementation of a new software application (Electio*Net*). New Jersey's clerks and registrars and support staff will require training on this new application. Activities, responsibilities, considerations and recommendations will be identified throughout the development of this training plan and will provide the details required to implement training for SVRS.

5.2 Scope

The materials for user training will be designed, developed and/or purchased and delivered to the various user groups who will need training in the use, support and maintenance of the Electio*Net* application.

Training for the Electio*Net* application will focus on New Jersey's county and municipal clerks and registrars, as well as any county and municipal technical staff. The user community will be trained by Covansys staff who have been trained to understand and use the SVRS System. All users will be trained to use the SVRS application and any hardware component or external device associated with SVRS.

This training plan will encompass all product training required by the Electio*Net* application. It is not intended to include any procedural training relating to legislation, laws or elections for the State of New Jersey.

Prior to attending SVRS application training classes, some users who have been identified as needing additional coursework, will attend basic Windows and Internet training (known as Track One). The intent of this coursework is to provide users who have limited knowledge of Windows and the Internet an opportunity to practice basic computer skills. After completing the basic training class, they will be prepared to attend the SVRS application training (known as Track Two).

The Electio***Net*** application training will cover the following functional areas:

- Activities Module
- Reports Module
- Inquiries Module
- Use of Online Help
- Scanning and use of the Bar Code reader

Another component of the Electio***Net*** training provided by Covansys includes the technical aspects of the application. This would include the System Administration modules — Subsystem Operation and Inquiries. This training will be held for selected audiences on the same day that the functional training modules are presented. The individuals who have administrator authority will be asked to remain to cover the additional topics.

5.3 Overview of the Training Task

The SVRS training must ensure that the system is quickly and easily assimilated by the users and that they are able to productively and accurately perform their daily functions when the system is implemented.

Each user must be able to successfully navigate and edit information within SVRS while continuing to meet their customer service needs. Therefore, relevant, job-specific training for this project is crucial to the initial and on-going success of the project. The value of even the most sophisticated piece of software is minimized if the users cannot integrate it into the successful accomplishment of their day-to-day activities. It is essential to our training effort for Covansys to gain an understanding of the customer service needs that are fulfilled by the users. This will help us establish and train on usage patterns that enable excellent service. Covansys' course developers will seek to thoroughly understand the customer processes associated with the SVRS application will be before the New Jersey SVRS training materials are developed.

Most users to be trained on Electio***Net*** will ask the following questions or make the following demands:

- How does it work?
- What is in it for me?
- Let me see it in action.

5.3.1 *How does it work?*

To address this question, the materials developed by Covansys will explain the system functionality, how it fits into the Voter Registration operation as a whole, and how it will be implemented for the State of New Jersey. Covansys will develop an overview module that delivers this information to the users through the use of a demonstration application that exhibits the system functionality.

5.3.2 *What is in it for me?*

Once Covansys has designed the overview module providing the users with an understanding of system fundamentals, the training materials will cover the reasons for the new system, and the expected benefits for the clerks and registrars and for the State. The training materials will be developed with an eye towards consistent emphasis to the users of the benefits that will be achieved by having access to a central database.

5.3.3 *Let me see it in action.*

Covansys training materials will include hands-on activities, which enable the users to practice performing their daily tasks in a classroom prior to having to perform them on the job. The practice activities will include detailed step-by-step exercises on how to perform required tasks. The exercises will simulate typical case situations, experiences, and examples.

5.4 Challenges and Points for Consideration

The SVRS training task is a large task and presents some very real challenges and points for consideration. Some challenges are known today and some will be discovered as the training task progresses. This document will address each of the known challenges on subsequent pages. A few of the known challenges and points for consideration are as follows:

- SVRS operates within a Windows/Internet standard framework. Prospective system users who possess little knowledge of Windows, Internet usage and associated components may find the learning and training process challenging because they do not already have the basic computer skills that will be required to operate SVRS. It is essential to the success of the training that all users have specific prerequisite skills and knowledge before attempting to learn the Electio**Net** application. Specifically, users must:

    — be able to use the computer keyboard and mouse with adequate proficiency.

    — have basic Graphical User Interface (GUI) skills and a working knowledge of Windows, including how to store and manipulate files and file folders.

    — possess Internet knowledge, including locating web sites, and navigating a web site.

- New hires who do not already have experience with New Jersey's Voter Registration laws and procedures may struggle with absorbing functional knowledge and learning new technology simultaneously. The classroom materials will be written based on the assumption that the users already have the required Voter Registration knowledge.

- New and additional hardware technology will accompany the SVRS implementation. Due to this introduction of new and/or additional technology, system users may find the learning and training process challenging because they will have to become familiar with operating various devices in order to completely utilize SVRS. The devices include:
  — CD drive to create a CD
  — Handheld bar code reader
  — Flatbed scanner
- High-speed Internet access provides fast Internet connectivity to the training database resulting in the screens mapping quickly. Slow Internet connectivity or no Internet connectivity would severely impact the delivery of the training exercises. It could also have a negative impact on the user community's perception of the system.

The Training Team will actively obtain feedback from the rest of the SVRS Project Team and other groups who will be affected by the SVRS training. This will include all of the User Groups affected by the system implementation. Gathering feedback will be planned from the beginning and will continue throughout the life of the project. Covansys will analyze this feedback and incorporate any needed changes that will help to ensure that the training program as outlined is meeting the needs of the participants and that the stated goals of the program are being achieved.

TRAINING METHODOLOGY

Designing a successful training program involves organizing a series of tasks, activities and deliverables. To ensure that each of these is completed in the correct order, Covansys follows an established methodology for training preparation and delivery. The Instructional System Design (ISD) Methodology used by Covansys for the New Jersey SVRS project is represented in Figure 1, *Instructional System Design Methodology*. This approach to instructional development is oriented toward job performance and is concerned with the identification of training requirements as driven by the needs of the SVRS application.

The ISD Methodology is a step-by-step approach for designing and delivering training. The methodology has five phases that are completed as part of the training process.

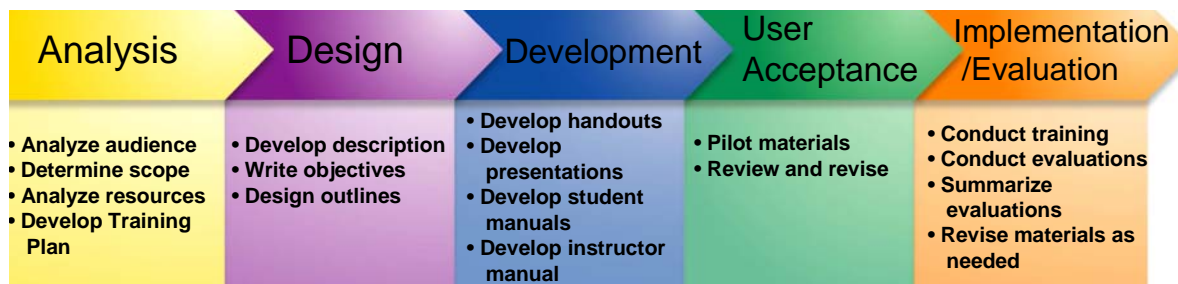| Analysis	Design	Development	User Acceptance	Implementation /Evaluation
• Analyze audience • Determine scope • Analyze resources • Develop Training Plan	• Develop description • Write objectives • Design outlines	• Develop handouts • Develop presentations • Develop student manuals • Develop instructor manual	• Pilot materials • Review and revise	• Conduct training • Conduct evaluations • Summarize evaluations • Revise materials as needed

Figure 1: Instructional System Design Methodology

The following section describes Covansys' use of the ISD model for the New Jersey SVRS project at an overview level. Following this section, the ISD model will be described by phase in a step-by-step format.

5.5 Summary of Activities, Roles, Responsibilities and Results

Activities

This section of the Training Plan is designed to be an overview of the activities, roles and responsibilities required to conduct a successful training program. For the New Jersey SVRS project, Covansys will follow a structured path to accomplishing that goal. Each step that is completed with the ISD Training Methodology phase will have resulting actions in future phases of the methodology. This section will present the phases, activities, responsibilities and results in total and the subsequent sections will break these phases and actions down into greater detail.

Roles

Covansys will lead the training program from its inception, taking on the roles of course design, development and delivery; conducting the training for New Jersey SVRS.

New Jersey SVRS project team members will assist Covansys in the training effort by acting as Subject Matter Experts. This role is needed during the early phases of course material development to ensure the accuracy of the information presented as it relates to New Jersey's clerks and registrars.

The following matrix further defines the sequence of training events and their interrelationships.

Table 1: *Activities, Responsibilities, and Results*

Project Phase	Activities	Responsibilities	Results
Phase One	▪ Define scope ▪ Gather requirements ▪ Estimate course development time ▪ Survey audience ▪ Summarize and report survey findings	Covansys	Distribute training surveys to all potential SVRS trainees Visit each county to verify survey results Summarize survey findings into a Training Analysis document
	Review Training Analysis document	New Jersey SVRS Project Team	▪ Encourage counties and municipalities to complete surveys ▪ Review Training Analysis document
Phase Two	▪ Perform GAP analysis of survey results and existing course materials. ▪ Develop agendas for the Track One audiences to match the needs revealed in the survey.	Covansys	▪ Provide agendas for Track One and Track Two courses. ▪ Determine number of copies of Track One materials needed ▪ Purchase Track One

Project Phase	Activities	Responsibilities	Results
	▪ Perform GAP analysis of existing application training materials with the New Jersey Voter Registration application. ▪ Develop agenda for the Track Two training.		training materials ▪ Print required number of Track One training materials (maximum 125) ▪ Prepare to revise Track Two application training materials.
	▪ Review recommended Track One agenda and purchased Track One materials. ▪ For Track Two course materials, act as subject matter experts to assist with defining scope and verifying accuracy of application training materials.	New Jersey SVRS Project Team	▪ Help to identify Track One training locations ▪ Recommend revisions to Track Two materials.
Phase Three	▪ Revise Track Two training materials according to agenda and course outlines. ▪ Estimate time required to deliver Track One and Track Two courses based on content. ▪ Develop evaluation forms. ▪ Develop training database.	Covansys	▪ Begin to map out a user delivery schedule based on time to deliver each Track to each Group matching up with the project implementation schedule. ▪ Assist with identifying possible training delivery locations.
	▪ Act as subject matter experts for the delivered Track Two training materials.	New Jersey SVRS Project Team	▪ Review completed Track Two training materials. ▪ Assist with identifying possible regional training delivery locations.
Phase Four	▪ Pilot training materials for UAT team members. ▪ Revise materials as needed.	Covansys	▪ Complete any needed revisions. ▪ Assist in finalizing training schedule according to project schedule and facility availability.
	▪ Participate in UAT as appropriate.	New Jersey SVRS Project	▪ Recommend revisions as needed. ▪ Assist with finalizing the training delivery schedule

Project Phase	Activities	Responsibilities	Results
		Team	for Track One and Track Two training.
Transition Phase	▪ Assist in finalizing training schedule according to project schedule and facility availability. ▪ Print copies of training materials for use by Covansys training staff.	Covansys	▪ Post schedule using as many communication vehicles as is possible ▪ Train users according to schedule
	▪ Finalize training delivery schedule for Track One and Track Two training. ▪ Provide mailing addresses for delivery of training materials if known.	New Jersey SVRS Project Team	▪ Encourage participation from end users to attend training as scheduled
Phase Five	▪ Visit sites after implementation to ensure understanding. ▪ Revise any training materials as requested by training staff.	Covansys	▪ Prepare and deliver an Executive Summary based on the collected evaluation forms. ▪ Distribute all training materials to New Jersey SVRS Project Team in soft copy format.
	▪ Conduct training classes for clerks and registrars for all Track One training for additional staff (over the 125 trained by Covansys) ▪ Distribute and collect evaluation forms.	New Jersey SVRS Project Team	▪ Return completed evaluation forms to Covansys Training Team. ▪ Recommend training material revisions.

Each of the five ISD Methodology phases and the Transition Activities are described in greater detail in the following sections.

5.6 Phase One: Training Analysis

The Analysis Phase includes conducting a Needs Analysis to determine the present skill level of the training audience. The Needs Analysis involves assessing the business needs of the organization and its employees through the use of surveys and JAD sessions. This phase is the most often overlooked aspect of developing the training materials but is the most critical. If the training needs of the learners are not properly understood, the objectives developed for the training program will not be on target and the materials produced will not lead to a successful training program.

5.6.1 Step One: Analyze the Audience

The following questions should be asked and answered as a part of completing this step:

- Who are the end users who will require training?
- What is the learner's prior experience with the subject matter?
- What skill(s) do the participants need to possess before the training course?

5.6.1.1 System Users

In order to understand the training audience, the Covansys Training Team must first understand who the prospective system users are. The Covansys Training Team must accurately define the training audience in order to meet the needs of all the users.

The following will be SVRS trainees:

County Voter Registration Officials – the Superintendent of Elections or the Commissioner of Registration, depending on the county, and their staffs

Board of Election Members and staffs

County Clerks and staffs

Municipal Clerks

5.6.1.2 Prior Experience

The scope of this training effort will not include training the users on functional knowledge of processing Voter Registrations. The course materials will be developed based on the assumption that the users are already fully trained in the New Jersey election laws and processes.

5.6.1.3 Prerequisite Skill Sets

One major consideration to note in the case of the SVRS project is that in many instances the users will not only be learning a new application, but possibly a new mix of technologies. The scope of the training effort must include both this foundational knowledge base (basic computer skills, including Windows and the Internet), as well as learning how to process voter registrations using SVRS.

An understanding of the users' current technology skill set was accomplished through surveying the user community. Any skill set deficiencies that were identified through the surveys will need to be resolved before the users receive training on the SVRS application. Covansys will work closely with New Jersey's SVRS Project Team to map out the prerequisite training for the appropriate staff.

5.6.2 Step Two: Determine Training Scope

The following questions should be asked and answered as a part of completing this step:

What are the expectations from this training?

- How will the users prepare themselves to be ready to take the training?
- How soon must learners be prepared for on-the-job performance?
- What is the expected duration of the class?
- What other considerations or constraints can be anticipated?
- When are the learners available to participate in the training?

5.6.2.1 Expectations

The expectation of both Covansys and the New Jersey SVRS Project Team is that the users will be functionally competent at the end of the training class and ready to perform daily tasks on the new application. To meet this expectation, Covansys will prepare training materials that are ready to be delivered on the dates identified by project's schedule.

5.6.2.2 Course Prerequisites

As stated in the *Challenges and Points for Consideration* section earlier in this document, Electio*Net* operates within a Windows/Internet environment. Prospective system users who possess little knowledge of Windows, Internet usage and associated components may find the learning and training process challenging due to not having the basic computer skills that will be required to operate Electio*Net*. It is essential to the success of the Electio*Net* training task that all users have specific prerequisite skills and knowledge before beginning the Electio*Net* training.

Specifically, users must:

- Be able to use the computer keyboard and mouse with adequate proficiency.
- Have basic GUI skills and a working knowledge of Windows, including how to store and manipulate files and file folders.
- Possess Internet knowledge, including locating Web sites, and navigating a Web site.

To address these potential issues before the functional training begins, Covansys sent out a survey asking the county and municipal clerks and registrars to rate themselves on a scale of 0-3 on their computer proficiencies in the areas which relate directly to the use of the SVRS System. The results will be summarized and targeted users will receive basic computer skills training as preparation for the Functional Training classes. Covansys will train up to 125 users on basic Windows training. The training materials will be provided to the SVRS project team for their own use in future training classes.

5.6.2.3 Project Scheduling

The obvious goal of the training plan is to have the training courseware ready and its delivery set at the moment the software is released.

In reality, though, the release of the software is more complicated than a single date. There is the date the software is declared ready for release, which is followed by the rollout of the software across the State. Certain counties and municipalities will have the software at their locations sooner than others.

Thus, Covansys trainers must work together with the software implementation team to synch up the training schedule with the rollout schedule. There are twenty-one (21) counties that have been sorted into groups designated for the rollout activities.

For each group, two levels of training course work must have been completed prior to the rollout activities. The basic Windows and Internet training known as Track One training will be delivered by the Covansys Team Trainers to a pre-selected group of trainees at each site.

After all the users who required the Track One training have completed their coursework they will be ready to join the Track Two application training class scheduled for their location. The Track Two training activities should be completed just before each group is ready to roll out. Currently the user training for the Pilot Group is scheduled to begin on September 19, 2005 so all of the calculations in this Training Plan are based on that date. Covansys will work backward from this date to build the courseware and forward from this date to ensure that the various training delivery components are ready.

Additionally, the individuals who are participating in User Acceptance Testing will receive training prior to beginning the UAT activities. This training will be a modified version of the Track Two training, along with some information about what User Acceptance is and how the activities will be completed.

Given New Jersey's densely populated cities and the number of sites in each rollout group, there will be a need for numerous Electio*Net* trainers from the Covansys staff. Covansys' initial projection to date is that as many as eight to ten staff members may be needed with additional staff members identified as backup resources. As the rollout schedule is completed and the project moves further along, this figure should be revisited and Covansys will identify resources and schedule their time.

5.6.2.4 Constraints

The major constraints to completing all the activities outlined in this training plan are:

1. New Jersey's densely populated large cities
2. The varying degrees of computer expertise
3. The large number of users to be trained (1000+)
4. The large number of corresponding trainers required
5. The number of counties and municipalities identified for each rollout

5.6.3 Step Three: Determine Training Requirements

The following questions should be asked and answered as a part of completing this step:

- Does the training require computer equipment?
- Is other equipment needed?
- Are there existing training facilities or will other arrangements need to be made for off-site facilities?

▪ Will the learners require additional supplies? Are there training aids that will be required by the instructor?

5.6.3.1 Training Facilities

The most optimal solution would be for the training to be delivered on a regional basis. As the project unfolds, there is a move towards a regional implementation approach. If this plan is adopted, the training could mirror the designated regions and an appropriate, regionally-centric training facility located. Some of the larger offices may have an appropriate meeting room that could be altered for use as a classroom. During the Training Survey, offices were asked if they knew of appropriate facilities that could be used for training. Additionally, Covansys could ask a centrally located community college facility if there is classroom space available for rental. There may be other state-owned facilities available for use as well.

5.6.3.2 Computer Equipment

Each student will need a PC loaded with Windows XP or 2003 and Internet Explorer version 6.0 or greater, and software loaded for the barcode reader. Additionally, the PCs need to be connected to the Internet.

5.6.3.3 Student Supplies or Instructor Training Aids

All training material will be distributed to the trainees prior to or during the training. This will include a Track One Windows XP Training Guide (if needed) and a Track Two Functional Training Guide and a Quick Start Reference Guide for each participant.

5.6.4 Step Four: Estimate Development Time

The following questions should be asked and answered as a part of completing this step:

▪ Are pre-existing training materials available for this course from outside vendors or previous in-house development?
▪ What is the estimated time needed to develop the training materials?
▪ How much time and staff will be required to assemble the training materials?

5.6.4.1 Development Time

The course development has two separate components, the Track One Windows/Internet training materials and the Track Two Electio*Net* functional materials. The Track One materials require a robust, easy to understand format designed to help users learn to navigate through Windows and the Internet. Since basic Windows training is readily available for purchase, it would not be cost effective for Covansys to develop these materials. Instead of developing these materials, Covansys has selected Track One training materials that are appropriate for the half day class envisioned for the users who require Windows and Internet training. These materials will meet the needs of the users, are cost effective and can be reproduced on an as-needed basis.

For the Track Two functional training, there are not commercially available training materials for purchase. However, cost and time savings are possible because Covansys will re-use existing Electio*Net* training materials. Covansys can use the existing materials to reduce the number of hours needed to develop the course content and training materials.

To calculate the number of development hours that will be required to produce training materials, the following formulas are typically used:

Pre-existing materials: 1 hour of delivered classroom training X 5 hours of development time = number of development hours required

New training modules: 1 hour of delivered classroom training X 10 hours of development time = number of development hours required

Other factors are added to the estimate for development time, and they are the time spent reviewing, editing, rewriting and printing after the initial publication is completed.

5.6.4.2 Production Requirements

All the publications are available in several formats. The appropriate distribution method must be determined for each publication. The publications may be printed and physically distributed or they are available electronically in a Reference Library.

If the material is to be printed, the following factors must be taken into account:

- The number of copies of the training materials required
- The location of the production facility and the time needed to ship the materials to their destination
- Managing the distribution of updates to the publication (Track Two only).

5.6.5 Step Five: Analyze Available Training Resources

The following questions should be answered as a part of completing this step:

- How many instructors are needed for course presentation?
- Are subject matter experts available to act as a resource?

5.6.5.1 Identify the Training Team

The Covansys Project Manager will establish a Covansys training team with responsibility for developing all course materials and delivering all Track One (up to 125 participants) and Track Two training activities.

5.6.5.2 New Jersey SVRS Resources

The Covansys Project Manager will request assistance from the NJ SVRS project team to review training materials for accuracy.

5.7 Phase Two: Training Design

The Covansys Training Team will design the training by developing learning objectives, choosing methodologies and organizing the objectives and methodology into discrete courses and units.

The Design Phase includes defining the Training Objectives, methods for delivering the materials, and selecting the media that will be used in the training delivery. The Training Objectives will define the skill level required by the learner upon course completion.

5.7.1 Step One: Develop Course Description

A course description is based on the information gathered in the Analysis Phase - Step Two when it was determined what was in scope and what was not in scope for this training class. Specifically, the questions asked during the Analysis Phase were:

What are the expectations from this training?

- How will the users prepare themselves to be ready to take the training?
- How soon must learners be prepared for on-the-job performance?
- What is the expected duration of the class?
- What other considerations or constraints can be anticipated?
- When are the learners available to participate in the training?

Now that the answers to all of these questions have been determined, the course description can be completed. The Covansys Training Team will use the course description as a guide throughout the course development as a yardstick to gauge whether the objectives, exercises, and lecture materials fit the course description.

5.7.2 Step Two: Write Course Objectives

Objectives state the expected outcomes of training. They define exactly what learners should be able to do when the training is completed.

The Covansys Training Team will write the objectives to match the stated goals for the SVRS System. The Training Team may revise some previously created objectives or create new objectives to match the SVRS system that has been customized for the State of New Jersey. The revised set of objectives that comes out of this step should accurately and completely reflect the system that the users will use. The Covansys Training Team must organize the objectives into workable units and courses.

Part of the work of this step involves assigning approximate time durations to each objective/methodology combination. This is necessary so that the duration of an entire course (which is a collection of such combinations) can be estimated.

Once the team has completed this step, a list of training units will be comprised, each with its own set of objectives and methodologies and a subsequent duration. The goal is a clear set

of units for each course, with a set of objectives for each unit. This will then serve as a preliminary outline for the actual development of the training material.

5.7.3 Step Three: Design a Course Outline

A course outline describes the structure and sequence of the instructional program. This involves designing and sequencing instructional units (lessons) in a way that is most meaningful to the learner to enable the learner to master the knowledge and skills necessary to improve job performance.

The most critical step in building good courseware is developing a good course outline. If the outline is well thought-out, clear, and developed to a sufficient depth, the remaining work will flow much more smoothly. In fact, once the outline is in place, the rest of the work can become something resembling fill-in-the-blank painting.

Once the outline is in place, the actual content will be added, which will expand the points developed for the outline. The next task is to group related objectives into separate training modules. For example, all of the objectives for registering new voters would be grouped into one unit.

5.7.4 Step Four: Design a Course Agenda

Covansys will develop reasonable estimates of how much time will be spent by the learners for each phase of the course before developing the materials. As the materials are developed, the time estimates for each unit are compared to the tentative agenda balancing the load of information against the time allowed for training. Each unit name and estimated time to complete is listed in the course outline.

5.8 Phase Three: Purchase Training Materials (Track One)

The Track One training materials selected should match as closely as possible the user requirements for learning identified by the survey results and the technical requirements of the new application.

5.9 Phase Three: Develop Training Materials (Track Two)

The Development Phase begins with a Plan of Instruction that outlines the guidelines for the course materials. During the Development Phase, all of the Instructor Materials, Student Materials, Handouts (if any) and Evaluation Forms are constructed. The Instructor materials include all of the notes that will be used by the Instructor to present the course, including tips and guidelines for conducting training classes.

The actual creation of the courseware is a critical task. This includes not only writing the content, but also designing and executing the graphic elements, laying out the material in an effective and pleasing presentation, and writing any delivery software routines that may be

needed. The database needs to be loaded with voter registration data from New Jersey's counties and municipalities so that the students can use the data for hands-on exercises.

Included in the materials to be developed will be:

- Hands on exercises
- All SVRS training manuals and tutorials
- Instructor's guides, including classroom setup information
- The training evaluation questionnaire

5.9.1 Step One: Develop Course Handouts

Items that will not be included in the participant's manual, but could be included as discussion topics include items such as answers to exercises that are done in class or perhaps recent articles from the newspaper that might be relevant to the class discussion. Additionally, there could be Quick Reference cards developed for items such as how to contact the Help Desk when the student has a question regarding using Electio*Net* at some future date.

5.9.2 Step Two: Develop Student Materials

Students' materials and exercises will be created to facilitate hands-on training activities. The Covansys Training Team will create exercises that are both realistic and appropriate in terms of difficulty and target audience. The base training materials that have been developed for Idaho Electio*Net* will provide resource material for New Jersey's SVRS training.

The user exercises will provide as much hands-on practice as possible using common situations and common dilemmas. In addition, the user manual and online help for the SVRS System will be referenced during the exercises to demonstrate the use of the manuals for common questions. This applied learning approach will allow users to become comfortable with the system and will increase their ability to transfer the training experience to the work environment.

5.9.2.1 Track One Training

As previously stated, the Track One materials will not be developed by Covansys since they contain standard Internet and Windows topics. There is no benefit in developing new materials when high quality, tested course materials are commercially available and can be purchased for a reasonable cost. The topics listed below are correlated to the survey questions which were asked of and responded to by the New Jersey users.

Track One Training Curriculum – Basic Training Outline		
Training Area	**Session Type**	**Topics Covered, as Applicable by System**
Introduction to Windows Browser Internet Basics	This hands-on training class teaches users Microsoft Windows XP Professional Edition. This course provides users with all the instruction necessary to become an expert user of this operating system and related software. Also provides an introductory overview of how to use the Internet. Can be classroom or individual training.	▪ Getting Started ▪ Control Panel ▪ My Computer ▪ Windows Explorer ▪ Browsing the World Wide Web ▪ Working with Favorite Web Pages ▪ Sending and Receiving Electronic Messages ▪ Using Internet Search Tools ▪ Downloading Files ▪ Virus Protection

5.9.2.2 Track Two Functional Training

Covansys trainers will deliver training to all users on the specific functional components being installed to support the Electio*Net* Operation. Track Two Functional Training will focus on the following key areas:

Track Two Training Curriculum – Basic Training Outline		
Training Area	**Session Type**	**Topics Covered, as Applicable by System**
New Voter Registration Change Voter Registration Election Management Maintain County and municipal Data Maintain Voter History Petition Processing	This hands-on training class teaches users how information is entered into the system, how information is changed, how information is retrieved, how elections are managed, and how reports are generated. A classroom setting is used for this training.	▪ Report Entry (Field Reports) ▪ Name Match Processing ▪ Address Verify ▪ Using On-Screen Help Facilities ▪ Using Manuals for Help ▪ Troubleshooting/Problem ▪ Report Retrieval ▪ Name Search ▪ Election History Search ▪ Ad hoc Facilities

Track Two Training Curriculum – Basic Training Outline		
Training Area	**Session Type**	**Topics Covered, as Applicable by System**
Reports and File Generation		
Redistrict Processing		
Inquiries		

5.9.3 Step Three: Develop Instructor Manuals (Track Two)

An Instructor Manual contains all of the elements from the Participant's Manual in addition to lecture notes and instructions for completing exercises.

The following sections will be included in the Instructor Manual:

Course Overview: this section will include a course outline and describe the course's content, its objectives, the intended audience, the course's scope, and the role of the instructor.

Course Agenda: this section will contain a list of the scheduled activities in order of presentation.

Instructor Checklists: (*Analysis Phase*) this section will contain lists of what needs to be accomplished before training can begin and all materials needed during the class.

5.9.4 Step Four: Create Course Evaluations

Covansys will create course evaluation forms for use in the classroom. The forms will be easy to understand and require a minimum of time for users to complete. Evaluation forms are collected and completed with the information summarized and fed back into the review process.

Suggestions for improvement will be evaluated to determine whether or not they should be immediately incorporated (such as errors in fact that need to be corrected) or corrected at a future date when the materials are being re-created for another training effort.

5.10 Phase Four: User Acceptance

5.10.1 Step One: Present Pilot Materials

The first session of the training materials in a condensed version will be presented to the participants of the User Acceptance Test (UAT) team. It would be helpful if the selected UAT team members are from the selected Pilot counties so that they can increase their knowledge and comfort level with SVRS at the earliest opportunity. After the Pilot counties have gone live, feedback from the training sessions will be collected and fed into the training materials review process for future training activities.

5.10.2 Step Two: Review and Revise Materials

Evaluation forms from the UAT participants will be reviewed by Covansys. If necessary, the training materials will be revised prior to the next conducted training session for the users.

5.11 Course Materials

Covansys will produce the Track Two training materials for the users throughout the rollout. After the SVRS System is fully implemented, Covansys will deliver a soft copy of all training materials to the New Jersey SVRS Project Manager. These materials can then be revised and reproduced as necessary by the State of New Jersey.

5.12 Phase Five: Implementation/Evaluation

The Implementation Phase includes all course delivery and testing activities. During the course delivery, the Covansys Training Team will make note of any revisions that need to happen before the next course is delivered.

The *Evaluation Phase* uses a systematic process of data collection that measures the effectiveness of training programs. The evaluation is undertaken to validate whether the program met the Training Objectives outlined in the *Design Phase*. It attempts to identify which participants benefited the least or the most from the training program. This phase assists in outlining approaches or techniques that might be used in future course development.

5.12.1 Step One: Conduct Training

In coordination with the project rollout schedule, the Covansys staff will deliver training to the users prior to their "go live" date. This Just in Time (JIT) training approach is designed to present the materials to the clerks and registrars just before it is needed so that they can apply the training materials as quickly as possible on the new SVRS System. Covansys trainers will conduct the Track Two training classes that have been outlined in this Training Plan.

5.12.2 Step Two: Conduct Evaluations

At the conclusion of each session, the users will be asked to evaluate the training session and give comments on the quality and applicability of the training materials. Covansys requests that after the course evaluation sheets are completed by the students, a copy of the evaluations is forwarded to Covansys. After all scheduled classes are completed Covansys will summarize these evaluations into an Executive Summary document.

5.12.3 Step Three: Summarize Evaluations

Covansys will collect the evaluations and summarize the findings into an Executive Summary document for review by New Jersey SVRS Project Team.

5.12.4 Step Four: Revise Materials as Needed

Covansys will make any needed revisions to the materials due to inconsistencies or changes to the software since the documentation was produced.

5.12.5 Step Five: Distribute Training Materials to New Jersey

At the conclusion of the rollout activities, Covansys will deliver a softcopy of all documentation produced for the training activities to the New Jersey SVRS Project Team for re-use in future training classes.

NEW JERSEY TRAINING IMPLEMENTATION

5.13 The Training Team

A training team will be established to execute the activities outlined in this training plan. The Covansys Project Manager, Training Manager and training team will determine the number of people and resources needed to develop and deliver the training.

5.13.1 State Subject Matter Experts (SMEs)

While the training material is being developed, a New Jersey SVRS SME should be available to answer questions on New Jersey-specific content. Although the material will be developed to be New Jersey-specific, the State should conduct a final review for accuracy. This person should also be prepared to answer questions and act as a resource to the users when Electio*Net* is implemented.

The State SME is responsible for the following:

1.   Acting as an information resource while training materials are being developed

2.   Reviewing the system documentation to ensure that it is consistent with the New Jersey Election laws and procedures

3.   Assisting with user questions after the SVRS project activities are complete

5.13.2 Covansys Training Team

The Covansys Training Team will utilize their business expertise in delivering both the Track One (up to 125 users) and all Track Two training materials. Covansys' training team will consist of individuals who completely understand the Electio**Net** application.

Covansys is responsible for:

1.   Constructing the Training Plan, including challenges, audience, presentation methods and evaluation procedures

2.   Designing and developing a curriculum to train the system users

3.   Purchasing, printing and delivering Track One training (125 users).

4.   Producing, printing and delivering the Track Two training materials and other system documentation

5.   Revising training materials on an as-needed basis until the Roll Out activities are completed and the training documentation is delivered to New Jersey.

6.   Delivery of Track 1 training to 125 users and delivery of Track 2 training to 1000+ users.

7.   Evaluating and summarizing the results of the training and the delivery approach

The New Jersey staff members are responsible for the following:

1.   Attending UAT training classes (if appropriate).

2.   Jointly developing a detailed training schedule.

3.   Recommending revisions to the training materials

4.   Attending Electio*Net* training

5.   Conducting training for new hires and officials after SVRS is implemented

6.   Acting as Subject Matter Experts for the users after SVRS is implemented

7.   Assessing future user training needs after SVRS is implemented

5.14 Training and Documentation Materials

The following will be provided as part of the SVRS training and implementation plan:

- Online Help
- User Guide/Training Guide
- Quick Start Reference Guide

5.14.1 The Development Process

5.14.1.1   Assess Existing Materials

Existing material will be used to build the initial content for the system User Guide. Documentation is accumulated from the following sources:

- Material from existing New Jersey documentation such as the Functional Design Document and User Acceptance Test Cases.
- Training materials from other Electio*Net* systems implemented in other states.

5.14.1.2   Design Output Templates

Templates will be designed to give each publication a different "look and feel." Thus, even though much of the content is shared, the User Guide/Training Guide, and the Quick Start Reference Guide will each have its own style and will look discernibly different from state to state.

5.14.1.3   Publish Documentation

The User/Training Guide will act as the comprehensive source for all system documentation. Sections of the User/Training Guide will be used to create the Quick Start Reference Guide. The comprehensive User/Training Guide will be published to HTML in order to produce the Online Help.

5.14.1.4   Review for Accuracy

An initial version of the User/Training Guide will be published and reviewed for accuracy. It would be helpful to have the SVRS project team's Subject Matter Expert available to help review the document to ensure that the New Jersey-specific information is correct.

5.14.1.5   Maintenance

At the conclusion of the training implementation, all materials developed for the New Jersey SVRS project will be loaded to an online Reference Library so that changes can be made on an as-needed basis.

5.15 Implementation Plan

5.15.1 Onsite Training Sessions

Covansys will conduct with the training classes for the Pilot Implementation. The first day of the visit will be dedicated to hands-on training. The second day the counties and municipalities will be live on their system with the trainer there to assist with any issues.

After the Pilot is complete, the New Jersey Trainers will conduct all onsite training classes following an Implementation Schedule that has been developed jointly by Covansys and New Jersey. Covansys will follow the classroom training with a one day onsite visit to be on hand for questions relating to the application.

5.15.2 Implementation Schedule

The preliminary rollout dates are currently in the SVRS Project Plan, but the actual counties and municipalities that are assigned to each rollout will be determined in Conversion and Migration Plan. Once the dates are verified and the counties and municipalities are established, a detailed Implementation Schedule will be developed jointly by Covansys and New Jersey identifying the number of trainers required and the locations for training. Additionally, the Implementation Schedule will clearly define town name, date and the names of the attendees who are scheduled for training.

5.15.3 Online/Computer Based Training Materials

Covansys will provide targeted, user-friendly online training materials for the application. These online materials will be in the form of Computer-based Training (CBT) modules and will be delivered via workstations connected to a Web-based system. For the Computer-based Training component, Covansys will use the Captivate software application from MacroMedia. The classroom materials will be developed by Covansys, tested in the classroom, modified as needed and then will become the source documents for the CBT. Covansys will develop the CBTs using a structured linear format to provide a step-by-step view of the application. The CBT modules will not permit the users to enter freeform text. Rather, the user will be asked to respond to true/false and multiple choice questions to ensure understanding of the material. Covansys proposes that the online training materials should be developed after the entire classroom materials have been developed and approved. While the New Jersey Trainers are conducting the classroom training, Covansys

training staff will be developing the CBT modules. This approach would reduce the cost of developing CBT significantly due to the following factors:

1. The Graphical User Interface will be stable.
2. All the rules and regulations that are specific to New Jersey will have been identified and written into the design of the classroom materials.
3. The materials will have been tested for accuracy in the classroom environment and any needed corrections will have already been made.
4. After the roles have been examined and job duties mapped Covansys and New Jersey's SVRS staff will identify the 80% of the classroom materials that will be used most frequently by the staff on the job. Then, the CBT will be designed and developed to cover those materials only. Obscure or seldom used features are not good candidates for CBT development as it is not cost effective - examples of this type of feature include the Purge/NCOA module and the Redistricting module.
5. The total number of delivered CBT modules will be six components. A component is equivalent to one hour of delivered classroom training. A sample breakdown of components is listed in the table below.

| Module Name	Quantity of Delivered Components
Overview of the Computer Based Training and Navigation Tips and Tricks	.25 Component
Overview of Electio*Net*	.25 Component
Add a new Voter	1 Component
Change a Voter	1 Component
Maintain Absentee Ballots	1 Component
Maintain Voter History	1 Component
Maintain Poll Worker and Polling Place	.50 Component
Generating Reports	.50 Component
Inquiries	.50 Component
Total Delivered Components	6 Components

6 TRAINING SCHEDULE AND LOCATION IDENTIFICATION (DELIVERABLE SVRS 072)

- How and where the training classes will be scheduled

6.1 Training Schedule by Milestones

Just-in-Time Scheduling

Assuming the implementation for a particular group of cities and municipalities is scheduled for the following Monday; Covansys will schedule SVRS county and municipal training for that region for the preceding week. All users will be trained by Covansys on the system functionality as their municipality or county is ready to "Go Live." This phased implementation will enable the users to receive just-in-time training classes so they will be prepared to effectively use the new system immediately. Covansys strongly believes "Just-in-Time" training is a valuable approach to ensure users are seamlessly ready to assume the day-to-day responsibilities of their job tasks using the new system.
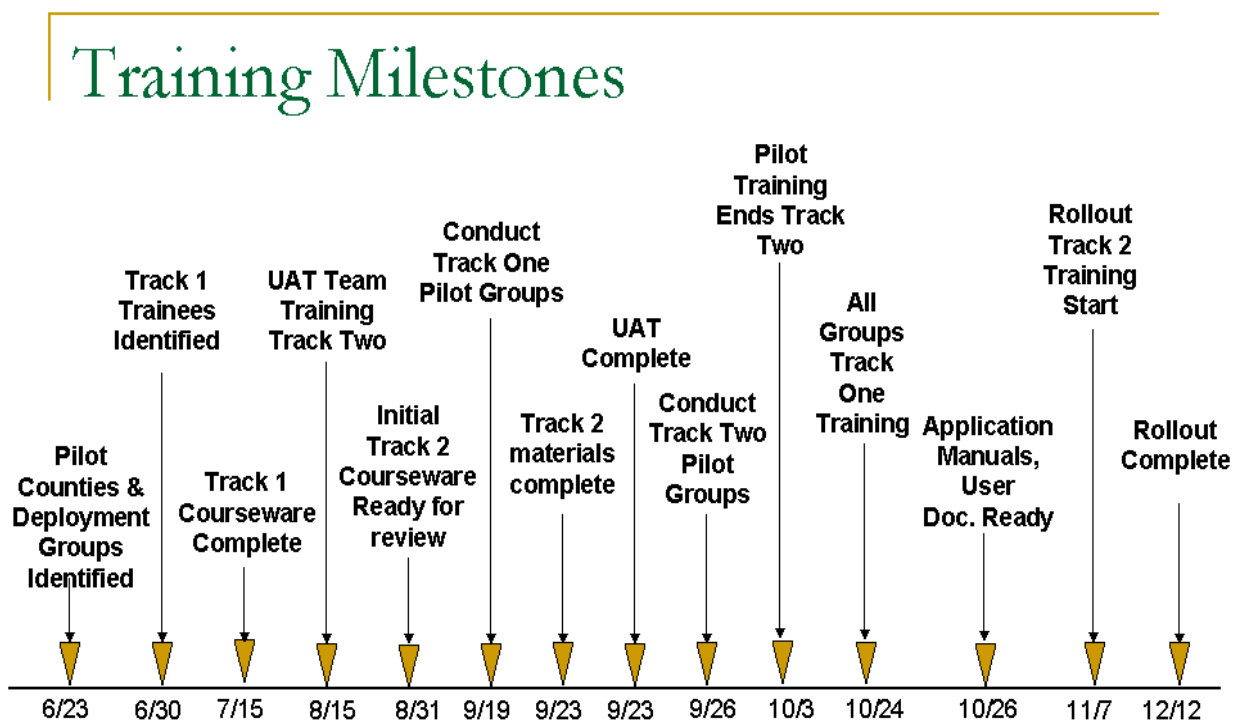
July 12, 2005   1

6.2 Potential New Jersey SVRS Training Facilities

To date, several potential training facilities have been identified. These facilities will be used for both Track One and Track Two training classes. Now that the Implementation Dates for each county have been finalized, reservations at each facility will be secured and a training schedule by county/group will be published and distributed.

SUMMARY

SVRS provides a powerful tool that will enable the State of New Jersey to meet its goal of having a centralized database accessible to all system users in a real-time online environment. The training outlined in this document will help to ensure that the system capabilities are utilized to their greatest advantage by the user community.

APPENDICES

This section will contain the following appendices:

- Training Schedule – this schedule will be maintained regularly and updated with training locations, user names and dates.
- Other – relevant data and information as it becomes available